



OPEN SPACE AND RECREATION PLAN REQUIREMENTS

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The following pages have been compiled to outline the elements that need to be incorporated into a community's Open Space and Recreation Plan. A longer, step-by-step explanation of how to develop an Open Space and Recreation Plan can be found in the *Open Space Planner's Workbook*, available from the Division of Conservation Services. Get your copy online at www.state.ma.us/envir and click on Conservation Services.

SECTION 1: PLAN SUMMARY

Give a brief summary of what is being recommended in the Open Space and Recreation Plan. Mention the overall aspirations of the community that are addressed by the document. This can be an Executive Summary highlighting the critical needs, actions to implement the plan, important issues and identification of major projects.

SECTION 2: INTRODUCTION

A. *Statement of Purpose*

Describe why the plan was written. Include an update since the last Plan, citing past and current efforts to protect and enhance open space and recreational opportunities.

B. *Planning Process and Public Participation*

Describe the process used to develop the plan. Name the primary researchers and writers, people who worked on committees, etc. List the meetings, surveys, public participation, municipal assessments, etc. that contributed to the development of the plan. (Note: Support the formation of an advisory committee to monitor progress.)

SECTION 3: COMMUNITY SETTING

A. *Regional Context*

Describe the community's physical location and major watershed address (is it in the coastal plain, foothills of the Berkshires, Connecticut River flood plain?) and what effect that has had on the community's development. Describe the community's regional context in terms of resources shared with neighboring towns (such as water resources or a mountain range) and what effect that has had on the community's development. Also, describe its socioeconomic context: is it an isolated hill town, upper income Boston suburb, declining mill town? What effect does the economy have on the community's open space and recreation needs? (Optional Map)

B. *History of the Community*

Give a brief summary of the community's history, including the effects of its location as discussed in Section 3A above. Mention the historic and archeological resources that give the community special character. Note: Check with the local historical commission. (Optional Map)

C. *Population Characteristics*

Describe demographic factors that help identify patterns of need and interest. Consider population trends, density, family income, and major industries, employers and employment trends. The goal is to understand the town's needs for open space and recreation, not to duplicate census information. Optional Map.

D. *Growth and Development Patterns*

1. **Patterns and Trends:** Give a brief description of how the town developed and grew (e.g., started as a compact village surrounded by farms, roads now lined with "Form A lots". Or, old mill town surrounded

by forest, now experiencing heavy residential growth.) Think about the changing functions of open space and recreation lands and how they help to define and preserve the town's character. (Optional Map – Current Land Use.)

2. Infrastructure: Describe the existing infrastructure and the effects it has had on development patterns. The intent is to understand the effects of the town's "gray" infrastructure on its "green" infrastructure, or open space, and to help define and preserve the town's character. (Optional Map). Include the following infrastructure systems:
 - a) Transportation Systems.
 - b) Water Supply Systems
 - c) Sewer Service
3. Long-Term Development Patterns: outline local land use controls (zoning laws already in place). Include the Zoning Map (Required Map 1). List scheduled and proposed subdivisions and expansions to the infrastructure, then describe the effect this will have on existing open space. Describe what the community will look like with a maximum build-out of the current zoning plan. This will indicate what residual open space will remain if nothing is done. More positively, it will indicate the vulnerable areas needing permanent protection given present trends. Comment on ecological impacts. The EOEA build-out data should be included. Mapping long-term development patterns is recommended.

SECTION 4: ENVIRONMENTAL INVENTORY AND ANALYSIS

This inventory section is an inventory of your community's natural and cultural resources. The analysis should begin to suggest the Open Space and Recreation Plan goals and objectives that will help protect the biodiversity, ecosystems and ecological integrity of your town. (Note: this environmental data will allow the planning committee to assess the possibility of legal constraints for development in Section 7: Analysis of Needs.)

A. Geology, Soils and Topography

1. Discuss the essential structure on which your community is based. Give brief description of topography, geologic features and soils, especially prime and significant (statewide) agricultural soils. Consider resources such as sand and gravel deposits, erodible soil types, significant hills, eskers, kettle holes, caves, and cliffs, etc.
2. Describe the effects these have on development, drinking water and wastewater issues, recreational opportunities, erosion, etc. The required Soils and Geologic Features Map (Required Map 2) should show soil types grouped by development limitations.

B. Landscape Character

Describe those aspects of the landscape that give your town its own special character. Focus attention on distinctive landforms, unique environments, and areas of particular scenic interest. Consider the impact that changes in development might have on the overall scenic character of the town or on recreational use of various areas. Note where that may happen and how adverse impacts might be prevented. Map the notable areas on Required Map 3, unique Features Map (this map will also include features mentioned in Section 4, F. Scenic Resources).

C. Water Resources

The text should mention existing recreational uses, classification of the water, and status in regard to access. Mapping Water Resources is Required Map 4.

1. Watersheds - map major watersheds and sub-watersheds and mention on-going efforts to protect them (local stream teams, watershed associations, and watershed teams). Refer to the Source Water Assessment Program (SWAP) that is mapping all water supplies, their areas of contribution, and threats to the water supply.

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2. Surface water - lakes, ponds, bays, streams, rivers, and reservoirs; Outstanding Resource Waters (ORW) marine and brackish waters, extent of tidal penetration into estuaries. Include surface water supplies to water supply reservoirs (required on the map);
3. Aquifer Recharge Areas – existing and potential drinking water supplies. Include zones of contribution to public supply wells (at a minimum, consider Zone I and Zone II recharge areas);
4. Flood hazard areas - use FEMA maps for zones A and V.
5. Wetlands

D. Vegetation

In discussing the vegetation of your community, concentrate on the recreational values such as hunting, intensive recreation, and scenic viewing, as well as natural resource protection issues such as biodiversity, and ecosystem protection, economic impact, soil stabilization qualities, etc. (Optional Map to show Vegetation and Fisheries and Wildlife.)

1. General inventory - mention important plants and plant communities that characterize the area;
2. Forest land - include unusual cover types and large uninterrupted blocks of woodland;
3. Agricultural land – these parcels have both scenic values and may serve as cover for wildlife;
4. Wetland vegetation – important wildlife resource
5. Rare species, including federal and state listed endangered, threatened and special concern species.
6. Sites having unique natural resources such as barrier beaches, vernal pools, heath land, quaking bogs; and
7. Vegetation mapping projects that have been undertaken on a regional and statewide basis.

E. Fisheries and Wildlife

This discussion should be similar to the one in the previous section, that is, an inventory of fish and wildlife species found in the community, with consideration of necessary steps to protect your community's biodiversity and ecosystems.

1. Inventory - General description of wildlife and wildlife habitats, including shellfish where appropriate;
2. Information on vernal pools;
3. Corridors for wildlife migration;
4. Rare species, including federal and state listed endangered, threatened and special concern species.

F. Scenic Resources and Unique Environments

This section should identify and map those areas that contribute to the community's character, which was mentioned earlier. These resources may or may not fit neatly into one of the previous categories, but should be valued and discussed here and mapped for their aesthetic importance (Required Map 3).

1. Scenic landscapes – include notable areas such as hilltops, stream corridors, open meadows, agricultural landscapes, scenic views and scenic roads. Consult DEM's Scenic Landscape Inventory.
2. Major characteristic or unusual geologic features and any other resources for potential protection and exploration.
3. Cultural, archeological, and historic areas.
4. Unique Environments – include state identified Areas of Critical Environmental Concern.

G. Environmental Challenges

Discuss the environmental challenges in your community and region that influence open space and recreation planning. (Optional Map)

1. Hazardous waste and brownfield sites
2. Landfills
3. Erosion
4. Chronic Flooding
5. Sedimentation

6. Development Impact
7. Ground and surface water pollution including both point and non-point sources
8. Impaired water bodies, both in terms of water quality and water quantity (available through DEP).
9. Others

SECTION 5: INVENTORY OF LANDS OF CONSERVATION AND RECREATION INTEREST

This inventory describes ownership, management agency, current use, condition, recreation potential, public access, type of public grant accepted, zoning and degree of protection, for each parcel. The information may best be presented in map and matrix form with an accompanying narrative. (Required Map 5.) All municipally owned conservation and recreation facilities and programs must be evaluated for accessibility to people with disabilities (please refer to *The Open Space Planner's Workbook*, Appendix H.)

This section studies the degree of protection from destruction or degradation that is afforded to various parcels of land owned by private, public and nonprofit owners.

- ◆ Private lands can be protected in perpetuity through deed restrictions, or conservation easements (yet some easements only run for a period of 30 years and those lands are therefore not permanently protected open space).
- ◆ Lands under special taxation programs, Chapter 61, 61A or 61B, are actively managed by their owners for forestry, agricultural, horticultural or recreational use. The town has the right of first refusal should the landowner decide to sell and change the use of the land, therefore, it is important to prioritize these lands and consider steps the community should take to permanently protect these properties.
- ◆ Lands acquired for watershed and aquifer protection are often permanently protected open space.
- ◆ Public recreation and conservation lands may be permanently protected open space, provided that they have been dedicated to such uses as conservation or recreational use by deed. Municipal properties may be protected via the Town Meeting or City Council vote to acquire them.
- ◆ Private, public and non-profit conservation and recreation lands are protected under Article 97 of the Articles of Amendment to the State Constitution.

A. Private Parcels

Inventory significant (perhaps due to size) private holdings.

1. Agricultural Properties – Chapter 61A, Agricultural Preservation Restriction (APR) Program, and other agricultural land, prime or statewide significant agricultural soils. Include lands not currently in agricultural use.
2. Forested Land – include unusual cover types, large uninterrupted blocks of woodland, large single ownerships of woodland, tree farms and management woodlands, and Chapter 61 lands.
3. Areas significant for water resource protection such as high-yield aquifers, lake shoreline, or river corridors.
4. Priority areas for protection of rare species, exemplary natural communities, and associated ecological lands, derived from the Natural Heritage Atlas, and (when complete) the Natural Heritage BioMap. Note, also, that some regional biodiversity assessments have been done and can be consulted.
5. Less-than-Fee Interests – lands encumbered by conservation restrictions, wetland restrictions, watershed protection restrictions, historic preservation restrictions, etc.
6. Private Recreation Lands – some may be classified as Chapter 61B such as private golf courses, marinas, fish and game clubs, ski areas, etc.
7. Estates
8. Major Institutional Holdings – some colleges and private schools may have recreation facilities, hospitals may have extensive open space acreage.

9. Other Resource – corporate holdings (may already have ballfields on them), landfills planned for closure and available for reuse, brownfield sites, quarries with recreational potential, etc.

B. Public and Nonprofit Parcels

This is also a descriptive inventory listing facilities, and evaluating existing conditions, current use, and potential for greater use. Note whether or not the land is protected open space, the amount of public use/access allowed, and the source of funding if the property was acquired or developed with DCS grant assistance (Self-Help, Urban Self-Help or Land and Water Conservation Fund). Communities who have passed the Community Preservation Act, and the Cape Cod Land Bank must also track open space properties acquired with those funds.

1. Public conservation and recreation resources - federal, state, municipal lands and facilities for conservation and recreational use.
2. Non-profit Lands - lands of the local land trusts and similar private nonprofit groups, described according to features, usage and potential.
3. Other public, unprotected lands - state hospitals, prison grounds, state and federal schools and institutions, etc.

SECTION 6: COMMUNITY VISION

In this section, discuss how the community's overall open space and recreation goals, or visions, were obtained, and describe those goals in broad statements.

A. Description of Process

Briefly describe the process used to determine what the citizens of the community value. The process could have been a series of public meetings, surveys or questionnaires as mentioned in Section 2. These opinions, and the examination of trends and resources, should be used to guide the articulation of your community's overall goals.

B. Statement of Open Space and Recreation Goals

These goals should be stated in very general, broad-brush terms: what is the overall vision for the community in the future and what it should look like. Be careful not to jump to specific objectives or actions yet. Stay at the "big picture" level. The goals should describe an "ideal" open space system that would meet the variety of needs that were identified through biological and ecological analyses, expressed in community surveys, inferred from facility use, or implied by local development policies and any other existing resource protection plans, or as a result of known facility deficiencies.

SECTION 7: ANALYSIS OF NEEDS

In this section, discuss the implications of all the material that has been presented in the previous chapters. This chapter should be a systematic examination of what is needed to achieve the community's stated goals.

A. Summary of Resource Protection Needs

Document your statement of needs with data you have collected from the environmental inventory in Section 4 and the inventory of public and private lands of conservation and recreation interest from Section 5 (the inventory matrix will help here), and responses from surveys, questionnaires, and public meetings. Work toward protecting large core areas, linked via riparian and upland corridors that will maintain or restore your town's ecological network – your community's "green infrastructure". Note gaps in the existing trails, greenways, linkages to major forest or agricultural resources in adjacent communities, trail networks, and riverways and other surface water bodies, etc. (Refer back to Regional Context in Section 3).

B. Summary of Community's Needs

Include data on recreation and conservation needs from the Community Setting section, as well as information gathered from surveys, questionnaires, public meetings, and *Massachusetts Outdoors!* the Statewide Comprehensive

Outdoor Recreation Plan (SCORP) for supply and demand in your area. Remember to include the needs of special populations such as people with disabilities.

C. Management Needs, Potential Change of Use

Mention specific current and future (i.e. if specific recommendations are adopted) management needs, such as staffing or conflicts of use. Are local boards (such as recreation, open space committees, school, DPW and conservation commission) communicating? Are certain areas threatened by abutting development? Also include special opportunities, e.g., a quarry with rock climbing potential, a soon-to-be-closed landfill with scenic and active recreation potentials, a brownfield site with redevelopment opportunities or other atypical resources.

SECTION 8: GOALS AND OBJECTIVES

In this section, the statement of vision and general goals from Section 6 and the data analyses from Section 7 are synthesized and expanded to create a comprehensive set of goals and objectives. Please note that the categories developed as sections of the report are not necessarily the best way to organize and present your objectives. Go back to the community goals and organize your objectives and actions into categories that fit appropriately. During the planning process, your goals and objectives may be altered several times due to what you discover about your needs. The planning process is always cyclical.

SECTION 9: FIVE-YEAR ACTION PLAN

In this section, you establish a year-by-year timetable for specific actions to accomplish some of the objectives listed in the previous chapter. Through this process priorities are established based on goals and objectives listed in the previous chapter. This is where to get specific about how to achieve the “big picture” goals. Include an Action Plan Map (Required Map 6) showing the effect that successful implementation of the actions would have on your town.

- ◆ It is important to avoid a long list of actions presented in a random order. With thoughtful organization, you can be sure that all important goals and objectives are being addressed and listed by relative priority.
- ◆ There needs to be some flexibility assumed with the timetable. For example, a property may be put on the market earlier than anticipated. The Action Plan should allow early action if opportunities arise out of sequence.
- ◆ Each year, the community (perhaps your newly formed Open Space Committee, or Community Preservation Committee, or Cape Cod Land Bank Open Space Committee) should evaluate implementation activities of the previous year and revise the Action Plan accordingly. This will make the formal five-year update an easier task. Consider making annual evaluations of the plan one of the action items!

SECTION 10: PUBLIC COMMENTS

◆ Local Review

First, distribute your draft Open Space and Recreation Plan to the Planning Board, chief elected official, Conservation Commission, and your regional planning agency. Letters of review from these groups and individuals must be included in the final plan submitted to DCS. Letters of review from boards of health, appeals, and recreation, EOEA watershed team leader, and other open space committees are desirable. Consider distributing the plan to major land-owning agencies. Please submit a dated distribution list and any comments received. Comments from the chief elected official, the planning board, and regional planning agency, at a minimum, must be included in the final plan.

◆ The Approval Process

The only mandated letter of approval is from the Division of Conservation Services. DCS may require changes, so do not authorize final printing (and multiple copies) until DCS issues a letter of approval.

◆ Formatting and Publishing Your Final Report

All final, approved plans must be bound, legible, and include numbered pages and a table of contents. The cover and title page must be dated. The plan must follow the format of EOE's *Open Space and Recreation Plan Requirements* as they may be amended.

Maps must be included with the plan, perhaps reproduced as an 8½" by 11" or 11" by 17" foldout version for each of the maps included in the plan. (Larger sized maps especially for the Inventory of Lands of Conservation and Recreation Interest and the Action Plan Map are recommended for presentation use, but printing multiple copies for each report may be too costly.) Provide your local library with at least two copies for general reference.

SECTION 11: REFERENCES

Cite all the reference documents you used and experts you contacted in preparing your community's Open Space and Recreation Plan.

Suggested references include:

1. *The Open Space Planner's Workbook* available online at www.state.ma.us/envir.
2. *Massachusetts Statewide Comprehensive Outdoor Recreation Plan (SCORP)* available online at www.state.ma.us/envir.
3. Executive Office of Environmental Affairs online at www.state.ma.us/envir. Look for information on the Community Preservation Act, and Watershed Initiative.
 - ◆ Department of Environmental Management: www.state.ma.us/dem
 - ◆ Department of Fisheries, Wildlife and Environmental Law Enforcement: www.state.ma.us/dfwele
 - ◆ Department of Environmental Protection: www.state.ma.us/dep
 - ◆ Department of Food and Agriculture: www.state.ma.us/dfa
 - ◆ Metropolitan District Commission: www.state.ma.us/mdc

APPENDIX 1: PREPARING AN OPEN SPACE AND RECREATION PLAN UPDATE*What is an Open Space and Recreation Plan Update?*

An update is what its name would have you believe: it is an up-to-date Open Space Plan. It is a complete plan containing all the components of an Open Space and Recreation Plan written in accordance with the current planning requirements. The difference between an Update and a municipality's previous plan is that an update builds on the previous plan by revising those sections that no longer accurately reflect the character, needs, and goals of the community. Much of the data gathered during the last planning effort can still be very useful. Please refer to the following table for review of the sections and subsections that need revision.

SECTION	SUBSECTION	MUST BE REVISED	MAY NEED REVISION	NO CHANGE NECESSARY
1: PLAN SUMMARY		X		
2: INTRODUCTION	Statement of Purpose	X		
	Planning Process/Public Participation	X		
3: COMMUNITY SETTING	Regional Context		X	
	History of the Community			X
	Population Characteristics	X		
	Growth & Development Patterns		X	
4: ENVIRONMENTAL INVENTORY AND ANALYSIS	Geology, Soils, and Topography			X
	Landscape Character		X	
	Water Resources		X	
	Vegetation		X	
	Fisheries and Wildlife		X	
	Scenic Resources and Unique Environments		X	
5: INVENTORY OF LANDS OF CONSERVATION AND RECREATION INTEREST	Environmental Challenges		X	
	Private Parcels		X	
	Public and Nonprofit Parcels		X	
6: COMMUNITY GOALS	Description of Process	X		
	Statement of Open Space and Recreation Goals	X		
7: ANALYSIS OF NEEDS	Summary of Resource Protection Needs	X		
	Summary of Community's Needs	X		
	Management Needs, Potential Change of Use	X		
8: GOALS AND OBJECTIVES		X		
9: FIVE YEAR ACTION PLAN		X		
10: PUBLIC COMMENTS		X		
11: REFERENCES		X		